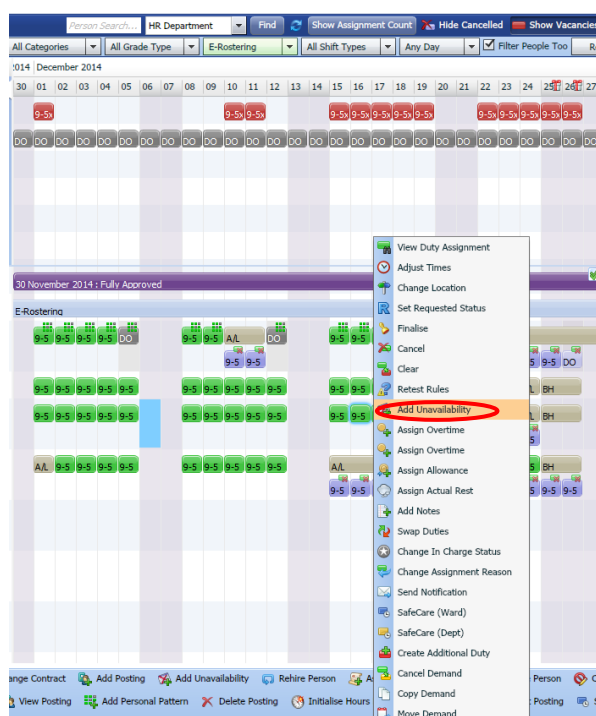


## Daily Changes User Guide

### Unavailability

Should a staff member contact the ward and inform them of an unavailability, whether it is sickness, careers leave or any other reason as to why the staff member cannot make their shift, this should be entered onto E-Roster at the earliest possible moment. In order to do this you should follow the below procedure:

- On the rota, right click on the persons shift that they were supposed to work and select “Add Unavailability”

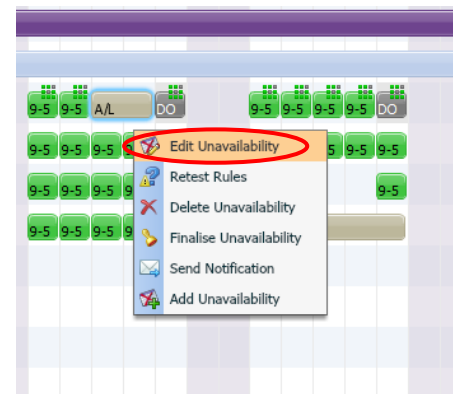


- Enter the “group” information of what type of leave it is to be taken and the reason why. Enter the start date and end date of the leave - all leave requires an end date even if the staff member does not know when they will return. If the staff member does not know when they will return they must contact the ward the next day with an update on their sickness.

A screenshot of the 'New Unavailability Details' form for Michael Foo (10930807). The form is divided into several sections. The 'Group' dropdown is set to 'Sickness' and is circled in red. The 'Reason' dropdown is set to 'Back Prob - Back Problems'. The 'Start' date is '16/12/2014' and the 'End' date is '17/12/2014', both circled in red. The 'Duration' is set to '2'. The 'State' is 'Approved'. The 'Next Steps' section has 'No Action' selected. The 'Work Time' section shows a week starting on 14/12/2014, with a table of shifts for HR Department (Agenda For Chi) and total hours. The 'Notes' section is empty. The form has 'OK' and 'Cancel' buttons at the bottom.

## Amending Unavailability

- If a staff member contacts the ward with an update of their absence. Right click on their unavailability and select “edit unavailability”



- From here you will be able to amend the dates of the unavailability and the reason.

**New Unavailability Details for Michael Foo (10930807)**

Group:  State:   
Reason:  Secondary Sickness Reason:   
Start:   Certification:   
End:   Industrial Injury: ☐ Third Party:   
Duration:  Return To Work Interview: ☐ Date:   
Refer To Occ Health: ☐ Date:

**Next Steps**

☒ No Action ☐ Cancel Demand ☐ Send To Bank

**Work Time**

Week Start:

Posting	14/12 Su	15/12 Mo	16/12 Tu	17/12 We	18/12 Th	19/12 Fr	20/12 Sa	Total Hours
HR Department (Agenda For Ch...				00:00	00:00			00:00

**Notes**

## Approving Leave

From the main screen select the three little dots next to annual leave or study leave (whichever needs approving).

You can also see how many requests need approving next to the leave requests.

...	Mon 09 Feb 2015	77	-	52	...
...	Tue 10 Feb 2015	59	-	45	...
<b>Awaiting Approval</b>					
...	Leave Requests	138			...
...	Study Requests	4			...
...	Bank Approval Required	-			...
...	Bank Duties to Finalise	-			...
...	Pending Requests	38			...
<b>Incoming Staff (Next 12 Hours)</b>					
	Person	Shift	Starting	Code	Location

HealthRosterClient - Windows Internet Explorer provided by Health Informatics (Proxy)

http://eroster/HealthRoster/LIVE/Client/HealthRosterClient.html?version=10.4.125.121

Annual Leave & Study Requests

Unit: Theatres ENT WH

Team: Any

Find

Requested Date	Staff Number	Grade Type	Group	Reason
09/12/2014 13:04	10943156	RN	Annual Leave	Annual Leave
18/01/2015 09:11	22055528	ACS	Annual Leave	Annual Leave
16/01/2015 13:09	22078070	AHP	Annual Leave	Annual Leave
06/01/2015 14:30	22581021	AHP	Annual Leave	Annual Leave
24/01/2015 14:40	10945952	HCA	Annual Leave	Annual Leave
18/01/2015 09:11	22055528	ACS	Annual Leave	Annual Leave
12/12/2014 11:05	10943650	RN	Annual Leave	Annual Leave
09/12/2014 14:44	10941590	ACS	Annual Leave	Annual Leave
09/12/2014 14:44	10941590	ACS	Annual Leave	Annual Leave
09/01/2015 20:26	23522588	AHP	Other Leave	Bank Holiday
05/01/2015 18:35	10940621	AHP	Annual Leave	Annual Leave
14/01/2015 07:01	10939718	AHP	Annual Leave	Annual Leave
12/01/2015 11:33	10927467	ACS	Annual Leave	Annual Leave
09/12/2014 11:30	20423520	ACS	Annual Leave	Annual Leave
16/12/2014 09:24	23311617	AHP	Annual Leave	Annual Leave
09/12/2014 13:15	10930555	RN	Annual Leave	Annual Leave
18/12/2014 12:39	21307478	RN	Annual Leave	Annual Leave
06/01/2015 04:32	23522588	AHP	Annual Leave	Annual Leave
24/01/2015 14:37	10945952	HCA	Annual Leave	Annual Leave
31/12/2014 17:01	10940621	AHP	Annual Leave	Annual Leave
05/01/2015 12:01	10933434	AHP	Annual Leave	Annual Leave
04/01/2015 11:30	10936789	RN	Annual Leave	Annual Leave
13/01/2015 13:30	21391216	RN	Annual Leave	Annual Leave
13/01/2015 20:44	23522588	AHP	Annual Leave	Annual Leave
13/01/2015 11:39	22055528	ACS	Other Leave	-
27/01/2015 16:07	10935625	RN	Annual Leave	Annual Leave
17/12/2014 08:37	10928718	RN	Annual Leave	Annual Leave
08/01/2015 17:11	TN100889	AHP	Annual Leave	Annual Leave
05/01/2015 17:06	22078070	AHP	Annual Leave	Annual Leave
05/01/2015 16:24	23362620	AHP	Annual Leave	Annual Leave
28/01/2015 14:00	10947309	ACS	Annual Leave	Annual Leave

Person: RN Ortiz, Russell (Band 5 Registered Nurse)

Unit: Theatres ENT WH

Bank: No

Grade: Band 5 Registered Nurse

Overlaps

Name	Staff Number	Grade Type	Grade	Requested Date	State
Thomas Ward	10947083	ACS	Band 2 Dual Role P	28/11/2014 10:55	Approve
Linda Cranny	10947994	RN	Band 5 Registered	28/11/2014 13:41	Approve
Russell Ortiz	10943156	RN	Band 5 Registered	09/12/2014 13:04	Request
Lynette Stafford	21307478	RN	Band 5 Registered	18/12/2014 09:46	Request
Rebecca Allen	10926638	RN	Band 5 Registered	24/12/2014 18:29	Request
Diane Groark	23522588	AHP	Band 5 Operating C	06/01/2015 04:29	Request
Lesley Critchley	22581021	AHP	Band 5 Operating C	06/01/2015 14:30	Request
Hazel Morton	10928718	RN	Band 5 Registered	13/01/2015 11:38	Request
Karla Graham	22055528	ACS	Band 2 Dual Role P	13/01/2015 11:44	Request
Beverley Hurst	21962260	AHP	Band 5 Operating C	15/01/2015 12:58	Request
Helen Brookes	22078070	AHP	Band 5 Operating C	16/01/2015 13:09	Request
Liam Harrison	10933434	AHP	Band 5 Operating C	17/01/2015 18:20	Request
Karla Graham	22055528	ACS	Band 2 Dual Role P	18/01/2015 09:11	Request
Karla Graham	22055528	ACS	Band 2 Dual Role P	18/01/2015 09:11	Request
Denise Murphy	10945952	HCA	Band 4 Assistant Pr	24/01/2015 14:40	Request
Kate Wilson	20388857	RN	Band 5 Registered	-	Approve
Sarah Welford	10927341	ACS	Band 2 Dual Role P	-	Approve
Kevin Gould	10924987	AHP	Band 6 Operating C	-	Approve
Angela Pritchard	10935031	AHP	Band 5 Operating C	-	Approve
Deborah Martin	20421612	AHP	Band 5 Operating C	-	Approve
Lyndsey Hulse	23124106	ACS	Band 2 Dual Role P	-	Approve
Angela Pritchard	10935031	AHP	Band 5 Operating C	-	Approve

Edit Unavailability Retest Rules Approve Request Reject Request Send Notification

- The green shaded area above shows you all the leave requests that have been submitted by staff - this will include both annual leave and study leave.
- If you select a staff member in the list on the left hand side, it will show who their leave overlaps with which you can see in the orange shaded area.
- If your rota is separated into teams you can filter the staff by using the team drop down above the green area and clicking find. By doing this it will also filter the staff on the right hand side.

17/12/2014 08:37 10928718 RN Annual Leave Annual Leave 0:

08/01/2015 17:11 TN100889 AHP Annual Leave Annual Leave 0:

05/01/2015 17:06 22078070 AHP Annual Leave Annual Leave 0:

05/01/2015 16:24 23362620 AHP Annual Leave Annual Leave 0:

28/01/2015 14:00 10947309 ACS Annual Leave Annual Leave 1:

Edit Unavailability Retest Rules Approve Request Reject Request Send Notification

- Once you have checked the leave overlaps you can approve or decline the request by selecting the appropriate button at the bottom of the screen.
- If you decline the request you will be prompted to give a reason for the request being declined.

## Leave Symbols



Leave has been requested



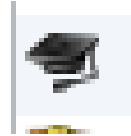
Leave has been requested and the staff member has left a note for the authoriser, to view this select the request and on the right hand side select the notes tab



Annual leave has been granted



Parenting leave has been granted (usually maternity leave)

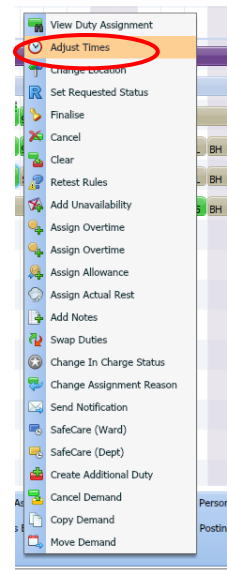


Study Request has been granted

## Shifts

### Amending shift times and assigning overtime

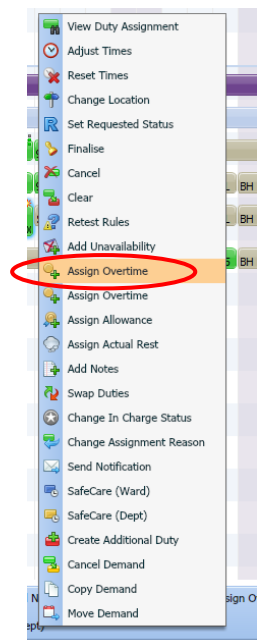
- If a staff member has altered their working hours and worked overtime. Right click on the shift that they have worked and select “adjust times”



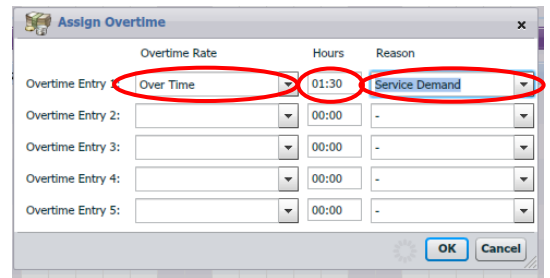
- Amend the hours as necessary, you can also enter a reason as to why the timings of the shifts had been assigned and enter any additional comments.

A screenshot of a dialog box titled 'Filled 9-5 (9-5) Duty On 16/12/2014'. It contains fields for 'Actual Duty Start' (09:00), 'Actual Duty End' (18:30), 'Rest Time' (00:30), and 'Work Time' (09:00). There is a 'Split Demand?' checkbox and a 'Duty Change Reason' dropdown menu set to 'High Acuity'. A 'Comments' text area contains the word 'Training'. At the bottom are 'OK' and 'Cancel' buttons.

- To assign overtime to the additional hours created, right click on the shift that you have amended the hours and select “Assign Overtime”



- Enter the overtime rate (rates are listed below), the amount of hours of overtime worked, the reasons for the overtime and click OK.



The 'Assign Overtime' dialog box has three columns: 'Overtime Rate', 'Hours', and 'Reason'. The first row is pre-filled with 'Over Time' in the rate column, '01:30' in the hours column, and 'Service Demand' in the reason column. These three fields are circled in red. Below this are five empty rows for additional entries. At the bottom right are 'OK' and 'Cancel' buttons.

- The overtime will now be assigned and shown as a gold coin on the shift. Also the staff member will now be able to see that the overtime has been assigned through EOL.



Depending on your access you may be able to assign a full shift to a staff member and assign the whole shift as overtime.

- Select the correct shift that you wish to assign and drag the shift down to the person who you wish to assign it to.
- Follow the above procedure in assigning overtime however assign the full shift to overtime



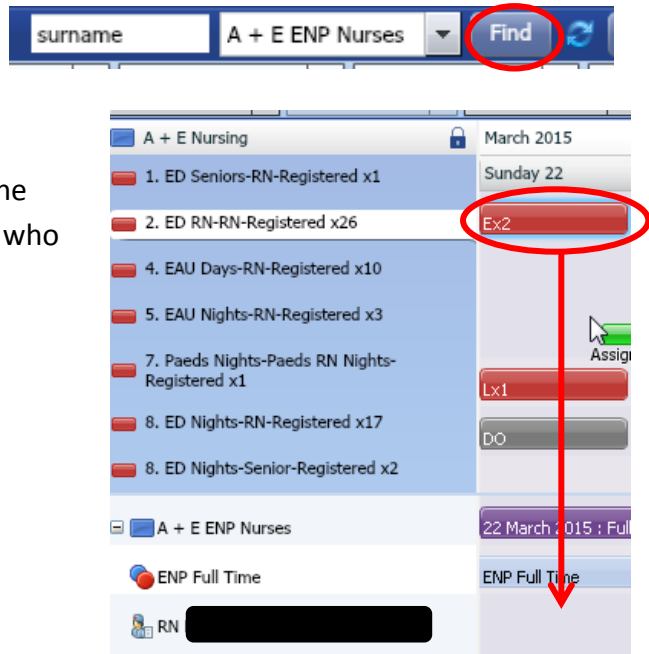
## Assigning Shifts to another Area

If your department cross covers with another and both are on E-Rostering, you are able to assign staff to the necessary shifts.

- Find the shift group you wish to assign to a member of staff from another area and lock the padlock in the top right of the blue box.

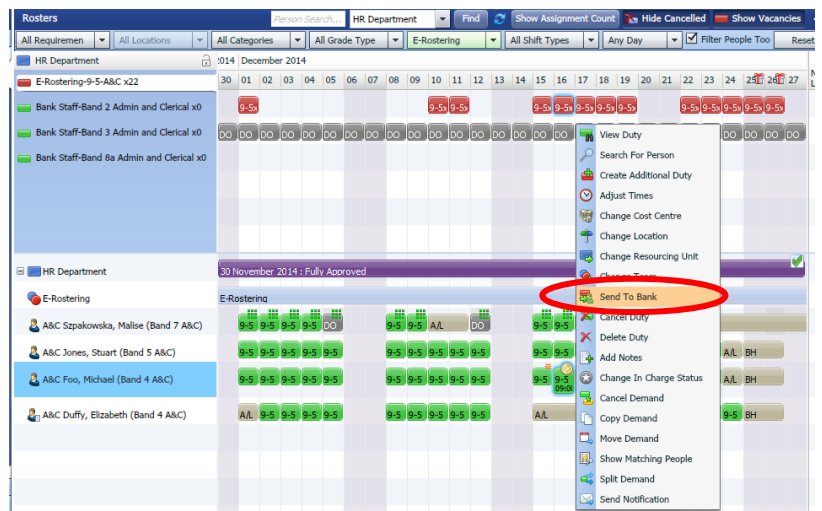


- Select the unit the staff member sits under, enter their surname in the search bar and find their roster.
- You will then be able to pull down the necessary shift to the staff member who needs to work it.

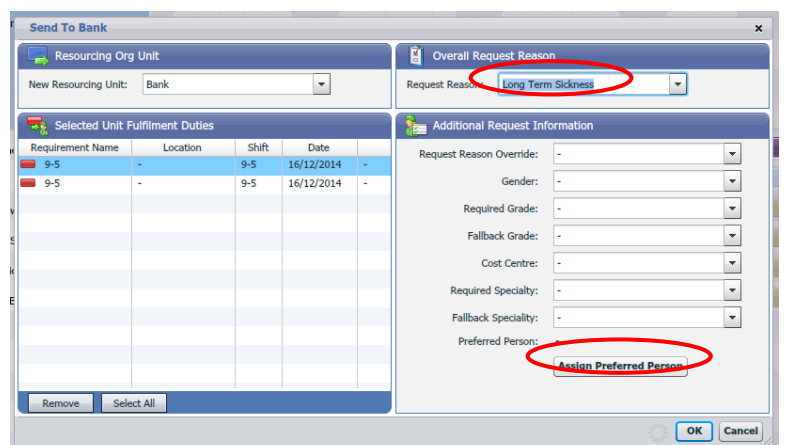


## Sending Shifts to Bank

- To send a shift to bank simply right click on the shift you wish to request bank from the unavailability pane and select “send to bank”  
Tip: if you work in a unit with multiple areas/shifts make sure that you are selecting the correct grade and area before sending to bank.

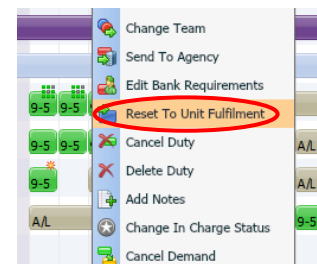


- Enter the reason as to why the shift is being sent to bank and any other additional information the shift requires. If there is more than 1 shift available to send to bank either select the one you wish to send or alternatively select both shifts and they will both go to bank.



- If you wish to request a specific bank staff select the “Assign Preferred Person”. Enter the staff’s surname and click find, highlight the staff member you wish to request and click select. The preferred person will now be listed then click OK.

- To cancel the bank request right click on the shift and select “Reset to Unit Fulfilment”



## Swapping Shifts

- Go to the roster for which the swap takes place
- Click on the first shift you wish to swap so the shift become highlighted, in the example we have selected Claire Fraser’s late on the 7<sup>th</sup> November

A + E Nursing		November 2014								
		02	03	04	05	06	07	08	09	10
1. ED Seniors-RN-Registered x12										
2. ED RN-RN-Registered x34										
4. EAU Days-RN-Registered x73										
5. EAU Nights-RN-Registered x81										
6. Paeds Days-Paed RN-Registered x71										
7. Paeds Nights-Paed RN Nights-Registered x34										
8. ED Nights-RN-Registered x69										
A + E Nursing		02 November 2014								
1. ED Seniors										
RN Bailey, Karen (Band 7 RN)		E	ACA	A/L		DO	DO	DO	E	DO
RN Fraser, Claire (Band 7 RN)		Snr	SD	DO	DO	MD	L	E	DO	DO
RN Johnson, Julie (Band 7 RN)		DO	E	MD	L	E	DO	DO	A/L	
RN Booth, Victoria (Band 6 RN)		DO	DO	DO	MD	L	E	L	DO	L
RN Forshaw, Suzanne (Band 6 RN)		A/L	SD	E	MD	DO	DO	DO	DO	E

- Hold the Ctrl button on your keyboard and select the shift you wish to swap, so that both shifts are now highlighted



- We have selected the Early for Karen Bailey on the 9<sup>th</sup> November
- Right click on the shift that you have just selected, and select swap duties
- The duties will now have swapped



Tip: make sure that when swapping shifts, staff are not on a DO, if so remove the DO first.

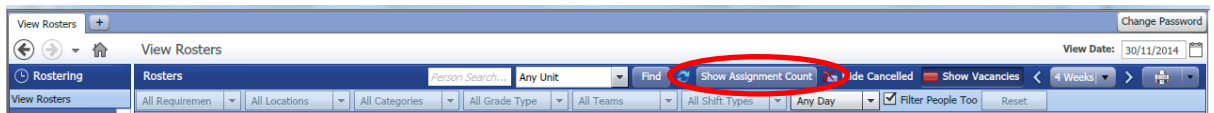
## Viewing Staffing Levels

### Viewing Skill Mix

- Click on the purple roster bar to select it



- Click on 'show assignment count' which is at the top of the page

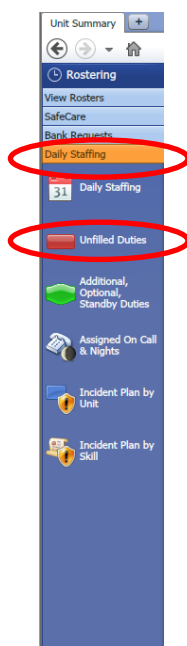


- The skill mix/assignment count will then show

Assignment Count							
Week1	Sun 30	Mon 01	Tue 02	Wed 03	Thu 04	Fri 05	Sat 06
E	0-1	1-0	0-0	1-0	1-0	2-0	0-0
L	0-1	1-0	0-0	0-0	0-0	0-0	0-0
N	1-1	0-0	0-0	0-2	0-1	1-2	1-2
Week2	Sun 07	Mon 08	Tue 09	Wed 10	Thu 11	Fri 12	Sat 13
E	0-0	1-0	1-0	1-0	2-0	2-0	0-0
L	0-0	1-0	0-0	0-0	0-0	0-0	0-0
N	1-1	0-0	0-0	0-1	0-1	1-2	1-2
Week3	Sun 14	Mon 15	Tue 16	Wed 17	Thu 18	Fri 19	Sat 20
E	0-0	1-0	0-0	1-0	2-0	2-0	0-0
L	0-0	1-0	0-0	0-0	0-0	0-0	0-0
N	1-1	0-0	0-0	0-2	0-1	1-2	1-2
Week4	Sun 21	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26	Sat 27
E	0-0	1-0	1-0	1-0	0-0	0-0	0-0
L	0-0	1-0	0-0	0-0	0-0	0-0	0-0
N	1-1	0-0	0-0	0-1	0-1	1-2	1-2

## Viewing Vacant Duties

- Go to the 'daily staffing' tab on the left hand side



- Click on unfilled duties
- Select your unit
- Select the dates you want to look at
- Click find

Valid To	Unit	Short Name	Start Time	End Time	Duty Duration
30/11/2014	A + E Nursing	E	07:00	14:30	10:45
30/11/2014	A + E Nursing	E	07:00	14:30	07:30
30/11/2014	A + E Nursing	L	13:30	21:00	07:30
30/11/2014	A + E Nursing	L	13:30	21:00	07:30
30/11/2014	A + E Nursing	N	20:45	07:30	10:45

The unfilled shifts will  
Be listed underneath

## Daily Staffing List

- Go to the 'Assigned Hours tab on the left hand screen'

- Select 'Assigned duties by person'

- Select your unit

- Enter the dates you require the staffing list

- Click find

- If you wish to print the list click on the printer icon in the top right.

The screenshot shows the 'Assigned Duties by Person' interface. The left sidebar has a red circle around 'Assigned Duties by Person'. The main area has a red circle around the 'Shift' dropdown menu set to 'A + E Nursing'. Another red circle highlights the date range 'From: 25/11/2014' to 'To: 25/11/2014'. A third red circle is around the 'Find' button. A fourth red circle is around the printer icon in the top right corner.

Assignment Info	Duty Date	Actual Work	Shift
Danielle Bate - E on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Early (E)
Lyndsay Owens - E on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Early (E)
Jacqueline Leyland - E on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Early (E)
Jean Fairclough - E on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Early (E)
Catherine Sweeney - E on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Early (E)
Judith Speakman - E on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Early (E)
Julie Fagan - E on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Early (E)
Lisa Green - E on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Early (E)
Fiona Kelly - E on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Early (E)
Joan Hessey - E on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Early (E)
Sarah Frost - L on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Late (L)
Anita Baines - L on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Late (L)
Karen Bailey - L on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Late (L)
William Fearon - L on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Late (L)
Rebecca Lingham - L on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Late (L)
Claire Davies - L on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Late (L)
Jade Roby - L on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Late (L)
Amanda Moran - L on 25/11/2014 in A + E Nursing	25/11/2014	07:30	Late (L)